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Sales Survey of the Soft Drink Industry

1984

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FOREWORD

Each year the National Soft Drink Association presents this review of the industry's sales performance based on a survey of Association members and other soft drink manufacturers and distributors.

This year NSDA again enlarged the survey questionnaire to include more detailed information on the industry in an effort to improve the survey's accuracy and relevance. As before, the need for additional survey questions was driven by the ever-increasing diversification of flavors, packaging and sales channels.

Again, following last year's procedure, the data were requested on a state-specific sales basis. As in 1983, the focus was on sales, although, as before, production data were also requested in a separate section on each survey form. To avoid double counting, bottlers were again asked to exclude sales of goods to other bottlers.

In the cases where organizations have multiple facilities, survey forms were mailed to corporate headquarters. Companies received one form for each state in which they have sales. If a company's franchised territory extends into adjacent states, forms were provided regardless of whether that particular company had a manufacturing operation or a warehouse in the adjacent states.

The 1983 survey emphasized achieving greater participation among bottlers and thus improving the accuracy of the survey data. This was successfully accomplished with a higher participation rate. The 1983 data were based on approximately 50 percent greater survey coverage than in 1982. The main reason for the greater coverage was a higher level of participation by the larger, multi-facility, multi-state companies than had been the case in prior years.

Responses are confidential. Each form received has its identification removed. The data are entered into the computer and then merged into the proper state file along with the other respondents from that state. By policy decision the forms from multi-state companies are never added together to get a company total. State files are aggregated first into regional data and then into national totals.

For the 1984 survey the emphasis was on making the survey results available on a more timely basis rather than on increasing coverage. And, there has been some improvement in timeliness in comparison with the publication of the 1983 results. A number of soft drink bottlers assisted in this objective by submitting their data on Lotus 1, 2, 3 formatted IBM PC diskettes. This greatly facilitated the survey process. First, it facilitated the preparation of the survey on the part of the bottler. Second, it greatly enhanced the speed and the accuracy associated with transferring the data into the analysis files at NSDA. Bottler participation in this effort is greatly appreciated. Somewhat surprisingly even though less time was allocated for returning the survey to NSDA and while the form itself was more complex, survey coverage grew by 23%. This added participation is also appreciated. Survey forms requested certain data for both the surveyed and the prior year. In this case 1984 and, looking backward, 1983. One result of this greater coverage is that several revisions were made to the

data published in the 1983 survey. Examples are: average-size container, output per employee and wholesale price per case.

As in previous surveys, the information provided by the respondents is used to compute industry-wide and regional sales of packaged goods classified by flavors and by container type; bulk sales classified as pre-mix and post-mix and by flavor type; packaged distribution channels and bulk distribution channels; packaged and bulk sales volume growth; and the growth in the wholesale value of soft drink sales from 1983 to 1984 measured in dollars. New in the 1983 survey and continued this year are charts and tables containing information on the growth in industry employment, average package size and number of packaged units per gallon of sales and per standard 288 oz. case; as well as per dollar of sales. Observations are given again this year on productivity. Gallons and standard cases per employee and dollars of sales per employee ratios, also provided for the first time in 1983, are given again this year.

New data: This year's survey provides additional information not found in earlier surveys. All charts and tables containing information not reported in last year's survey are highlighted with color shading. An example is the method of sale for packaged goods. Are sales by route salesperson, advance salesperson or tel-sell? Data on these questions are provided this year. Also new are data on the method of delivery. Are deliveries by conventional route truck or multi-case modules using transport vehicles? Also new this year are data on vending flavors. In the flavors category a new classification labeled waters is provided. This classification is made up of three sub-entries: 1) club/seltzer, 2) sparkling (unflavored), and 3) sparkling (essence or flavored). The aseptics market was included again this year and, unlike last year, the amount reported was greater than a "trace." For the first time data were collected on the percentage and total amount of each sweetener used by the industry. Other additional features this year are data on the number of units of a particular package type filled. In the past data on package type were only given in the volume dimension, i.e., the pecentage of packaged soft drinks that were marketed in a particular type of container. Unit data are now provided. Finally, data were collected on vehicle usage. These data are presented in the form of a number of factors; for example, the number of standard 288 oz. cases per delivery vehicle.

As with earlier versions of this survey, the national summary represents an estimate of the total industry's size and growth. Total industry includes bottler sales and sales made principally to the fountain trade by independent distributors or distributors owned by fast food chains.

While the principal emphasis of the survey is to ascertain industry averages, data are given for the 1984 sales year that characterize the typical form received by NSDA. Data developed from this perspective are given again this year.

It is believed that with the current level of industry response, the NSDA survey has significantly greater coverage than any other published survey and therefore should provide the user with the most accurate data profile of the industry available.

1984 NATIONAL SUMMARY

As earlier published reports indicated, 1984 was again a good year for the soft drink industry. As before, the NSDA survey not only confirms this but for 1984 it indicates that the year was better than earlier reports suggested. The 1984 NSDA survey data indicate that bulk sales increased by 10.92% with bottler bulk again leading the way as it did in 1983. Industry sales overall were up 7.98% as a result of the combined growth of 7.07% in packaged sales and the aforementioned bulk increase. Total sales were 4,615,380,000 cases of standardized units (288 oz.). The growth was a combination of population (11.8%) and per capita (88.2%) increases.

Total wholesale dollar value increased by 10.51% during 1984 led by an increase of 10.62% in packaged sales followed by a 9.10% increase in bulk goods. The estimated wholesale value of soft drink industry sales, measured net of price-off and volume discounts, was $22,231,230,000. Per capita consumption advanced to 469 12 oz. units, an increase of 6.98%.

Average container size increased slightly from 16.87 oz. per packaged unit in 1983 to 17.18 oz. in 1984. The number of containers filled increased by 5.65%. It is estimated that the industry filled 60.6 billion individual units in 1984. Of these, 12.5 billion represented fillings of refillable glass containers. Of the remainder, 10.0 billion non-refillable glass containers were filled, 4.0 billion plastic units were filled, 34.0 billion can units were filled, and 0.1 billion aseptic units were filled.*

Employment in the soft drink industry grew by 3.4% in 1984; in 1983 it increased only 0.96%. Nevertheless, the volume of soft drinks sold per bottler employee increased 4.4% in 1984. Concurrently, sales dollars per employee grew at a 7.0% rate. As has been the case in the past, a portion of this productivity increase was passed on to the consumer. It is estimated from data in the NSDA survey that the wholesale price for soft drinks increased by only 2.27%.

According to the NSDA survey, the average wholesale price for a gallon of packaged soft drinks was $2.50 ($5.63 per 288 oz. case), while it was $1.02 for a gallon of bulk measured on a finished drink basis.** On a total industry basis, an average gallon of soft drinks (whether packaged or bulk) wholesaled for $2.14. For bottlers, the 1984 figure for sales gallons per employee was 65,900. The average number of 288 oz. standard cases per employee was 29,300. For sales dollars per employee, the bottler average was $148,200.

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*There could be a considerable sampling error in the aseptic figure. This is because the sampled volume was very small and, always in such cases, the extrapolation to the population is less reliable than when the sample statistic is larger.

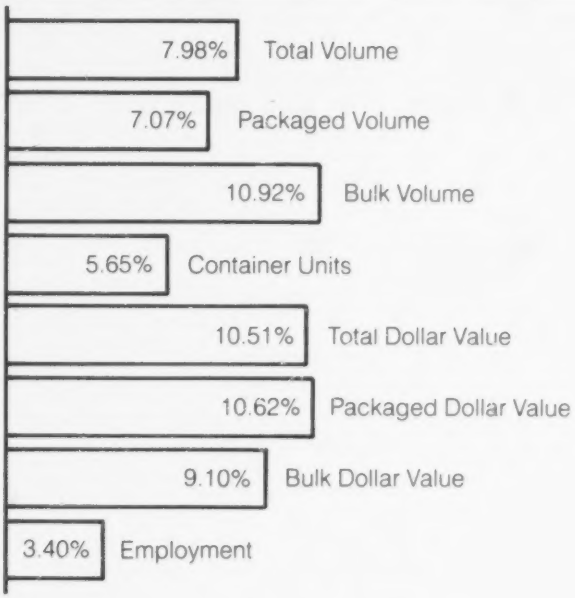
**Converting bulk in finished drink gallons back to syrup at a ratio of 5 parts carbonated water to 1 part syrup yields a figure of $6.12 for the average bottler wholesale price of a gallon of post-mix syrup.

NATIONAL DATA AND ANALYSES

Responses 280 Estimated Number of Plants 313

A. Summary Data

A.1 TOTAL SALES



A.2 UNIT SALES

Container Units Per Dollar of Packaged Sales	3.13

	1984	% Change
Container Units Per Gallon	7.45	– 1.82%
Container Units Per 288 oz. case	16.76	– 1.82%
Average Container Size (oz.)	17.18	1.84%

A.3 PER CAPITA CONSUMPTION

	1984	% change
Twelve Ounce Units	469	6.98%

TOTAL SALES

Soft drink sales and consumption increased in 1984 at rates greater than those experienced in 1983. Total volume (bulk and packaged) grew at a 7.98% rate, with packaged at 7.07% and bulk at 10.92%. The comparable 1983 figures were: total, 5.13%; packaged, 3.87%; and bulk, 9.42%. The number of containers filled in 1984 rose by 5.65%, even though the average container size increased by 1.84%. Total sales of 4,615,380,000 standard cases (288 oz.) represented a wholesale value estimated at $22.2 billion ($22,231,238,000). Total wholesale dollars are based on net sales, i.e., less volume discounts and price-off. On a comparable basis, 1983 wholesale dollars were $20.1 billion ($20,131,180,000).* Thus, total dollar value rose by 10.51% in 1984. Per capita consumption advanced to 469 12 oz. units. For each wholesale dollar of soft drink sales, 3.13 containers were sold to the public.

Turning to productivity, volume per bottler employee — including all plant, route, warehouse and office personnel — averaged 65,900 gallons (29,289 standard 288 oz. cases). This was an increase of 4.4% over 1983. In 1984 sales dollars, net of price-off and volume discounts, averaged $148,200 per employee. This was an increase of 7.0% over the prior year.

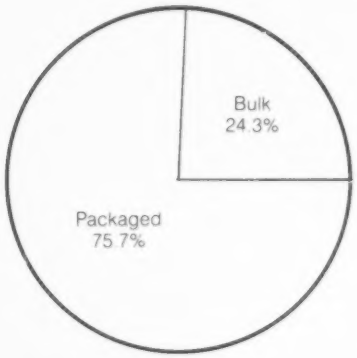
*There has been a slight adjustment to the figure published last year. This results from a revision of the 1983 dollars per gallon estimate. In order to develop change from prior year figures the 1984 Survey also asks for certain 1983 data. It is believed that the expanded 1984 coverage produced a more accurate estimate for 1983 dollars per gallon and therefore an adjustment has been made which affects the 1983 total sales value as well.

A.4 PRODUCTIVITY(SALES BASIS)

B. Market Share By Packaging Type

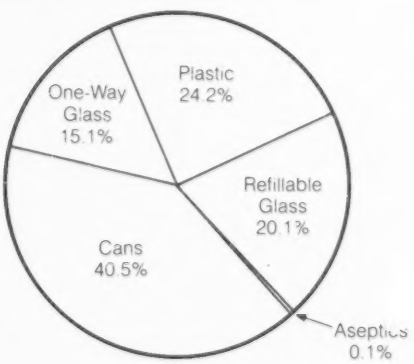
B.1 PACKAGING (Volume Basis)

MARKET SHARES



B.2 BULK (Volume Basis)

B.3 PACKAGED (Volume Basis)



MARKET SHARES (Volume Basis)

As used in this report, the term bulk packaging refers to the sale of pre-mix or syrup for use with dispensers or coin operated vending machines. For 1984, bulk sales accounted for 24.3% of the total national soft drink market with packaged sales holding 75.7%. This represents a shift of 0.7 percentage points from packaged to bulk during the year 1984. This translates into a −.92% decrease in packaged market share and an increase in bulk share of 2.97%.

Post-mix accounted for 87.9% and pre-mix accounted for 12.1% of the bulk sales. Measured against 1983, pre-mix lost 1.4 percentage points. The end result was a decrease of 10.37% in the market share of pre-mix. This is a continuation of a trend that has been going on for a number of years.

Turning to sales by package type, the market share for refillable glass was 20.1%; one-way glass, 15.1%; plastics, 24.2%; cans, 40.5%; and aseptics 0.1%. These percentages refer to soft drink volume and not the number of units of a particular type of container. That is, out of 100 gallons of soft drinks 20.1 gallons were packaged in refillable glass, etc. The changes in percentage points from 1983 were: refillable glass, −3.2; one-way glass, 0.7; plastics, −0.4; and cans, 2.8. Aseptics were not significant in 1983. The respective percentage changes in market share were: refillable glass, −13.7%; one-way glass, 4.9%; plastics, −1.6%; and cans, 7.4%. All of the above, and Tables B.1 through B.7 that follow, are on a volume of soft drinks sold basis, not, as mentioned, on a number of containers basis. Container unit based data follows in Tables B.8 through B.12.

B.4 SOFT DRINK SALES: REFILLABLE GLASS (Volume Basis)

6–12 oz.	12.4%*
16 oz./½ liter	69.5%
24–32 oz./1 liter	18.1%
	100.0%

B.5 SOFT DRINK SALES: ONE-WAY GLASS (Volume Basis)

6–12 oz.	15.3%*
16 oz./½ liter	79.3%
24–32 oz./1 liter	5.4%
	100.0%

*This year the 6-9 oz. and 10-12 oz. categories have been combined into a 6-12 oz. category. There is very little 6-9 oz. left in the market.

B.6 SOFT DRINK SALES: PLASTIC CONTAINERS (Volume Basis)**

½ liter	2.4%
1 liter	3.3%
2 liter	93.3%
3 liter and larger***	1.0%
	100.0%

B.7 SOFT DRINK SALES: CANS (Volume Basis)

Aluminum	89.5%
Bi-metal	10.5%
	100.0%

B.8 PACKAGED (Unit Basis)

Refillable Glass	20.6%
One-Way Glass	16.7%
Plastics	6.5%
Cans	56.1%
Aseptics	0.1%
	100.0%

B.9 SOFT DRINK SALES: REFILLABLE (Unit Basis)

6–12 oz.	21.0%
16 oz./½ liter	68.9%
24–32 oz./1 liter	10.1%
	100.0%

B.10 SOFT DRINK SALES: ONE-WAY GLASS (Unit Basis)

6–12 oz.	23.0%
16 oz./½ liter	74.3%
24–32 oz./1 liter	2.7%
	100.0%

MARKET SHARES (Unit Basis)

Tables B.8 through B.12 show the sales of soft drinks on a container unit basis. This is the first time these data have been computed from the NSDA survey data. Note that on a unit basis, the can is by far the predominant soft drink container enjoying a 56.1% share of the market. This is followed by glass, plastics and aseptics.

B.11 SOFT DRINK SALES: PLASTIC CONTAINERS (Unit Basis)

½ liter	8.7%
1 liter	6.0%
2 liter	84.7%
3 liter and larger	0.6%
	100.0%

B.12 SOFT DRINK SALES: CANS (Unit Basis)

Aluminum	89.5%
Bi-metal	10.5%
	100.0%

**One half liter, one liter and three liter plastic are the packaging categories most susceptible to sampling error, particularly the ½ liter whose use is concentrated in only a few market areas.

***This is a new category this year. In the 1983 survey, 3 liter containers were reported in the category "2 liter and larger."

C. Changes In Soft Drink Sales By Packaging Type

C.1 BULK SALES (Volume Basis)

Pre-Mix	1.5%
Post-Mix	15.0%

C.2 PACKAGED SALES (Volume Basis)

Refillable Glass	−7.4%
One-Way Glass	12.0%
Plastic	5.3%
Cans	15.0%

C.3 REFILLABLE GLASS (Volume Basis)

6–12 oz.	13.7%
16 oz./½ liter	−12.9%
24–32 oz./1 liter	4.8%

C.4 ONE-WAY GLASS SALES (Volume Basis)

6–12 oz.	−9.8%
16 oz./½ liter	24.8%
24–32 oz./1 liter	−38.3%

C.5 PLASTIC SALES (Volume Basis)

½ liter	33.8%
1 liter	−15.9%
2 liter and larger*	4.9%

C.6 CANS (Volume Basis)

Aluminum	18.7%
Bi-metal	−9.2%

C.7 PACKAGED SALES (Unit Basis)

Refillable Glass	−7.0%
One-Way Glass	11.8%
Plastics	5.3%
Cans	15.0%

C.8 REFILLABLE GLASS (Unit Basis)

6–12 oz.	21.1%
16 oz./½ liter	−14.3%
24–32 oz./1 liter	4.8%

C.9 ONE-WAY GLASS (Unit Basis)

6–12 oz.	−10.4%
16 oz./½ liter	24.6%
24–32 oz./1 liter	−35.4%

TOTAL SALES (Volume Basis)

Bulk sales were up 10.92% in 1984; lead by a 15.0% increase in post-mix followed by a 1.5% rise in pre-mix.

Packaged sales, in volume terms, were up 7.07%, led by cans at 15.0%. Refillable glass declined by 7.4%. One-way glass increased by 12.0% and plastic sales were up by 5.3%.

The growth of soft drinks sold in plastic containers appears to have been dominated by half liter at 33.8%, followed by two liter and larger at 4.9%. (See earlier footnote on susceptibility to sampling error.) One liter plastic containers fell by 15.9%.*

Among glass packages the use of the 16-ounce one-way glass container, and 6–12 oz. and 24–32 oz. refillable glass grew measured on a sales volume basis. All other one-way and refillable glass containers declined.

TOTAL SALES (Unit Basis)

Figure C.7 shows the change in packaging used by the soft drink industry on a unit basis. This is the first year that such data has been available from the NSDA survey. Cans grew by 15.0%, one-way glass by 11.8% and plastics by 5.3%. Refillable glass fell by 7.0%. Data on individual package sizes are given in figures C.8 through C.11.

C.10 PLASTICS (Unit Basis)

½ liter	33.8%
1 liter	−15.9%
2 liter and larger	4.9%

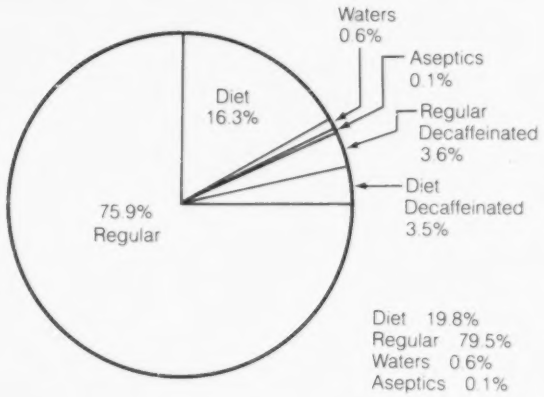
C.11 CANS (Unit Basis)

Aluminum	18.7%
Bi-metal	−9.2%

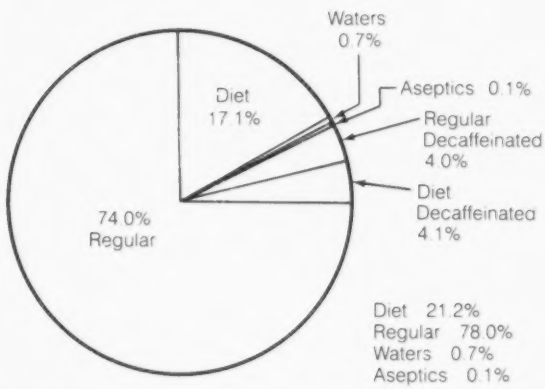
*It will not be possible to show the change in the new category of 3 liter and larger until next year at which time there will be the required two successive observations. This is also true for asceptic packaging.

D. Market Shares By Beverage Type And Flavor

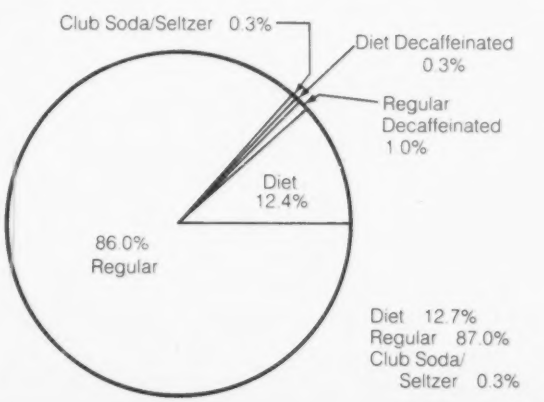
D.1. PACKAGED & BULK



D.2 PACKAGED



D.3 BULK



FLAVOR MIX

1984's flavor breakdown follows the same format as 1983. There are four basic categories of soft drinks: diet, regular, club soda/seltzer (this year labeled waters on the survey form and so labeled here in the relevant figures and tables), and aseptics. Within the Packaged Waters category the reported figures were 64.6% Club Soda/Seltzer; 14.5% Sparkling, Unflavored; and 20.9% Sparkling, Essence or Flavored. Bulk sales in this category were 100% Club Soda/Seltzer. Within the diet and the regular classifications data are presented delineating the decaffeinated market.

As was the case in 1983, there is more information provided on bulk categories than in prior years. For example, since flavors data are now available for two years it is possible to show percentage changes. This expansion of the data set is shown in Table D.8. Bulk flavors also now include sales through independent distributors. This is the first year for these data. Since in prior years only bottler bulk was covered, this information cannot be used for the flavor change computation.

In analyzing the data presented in tables D.5 through D.12, the reader is cautioned to note that 100% covers only the types of drinks mentioned in the particular table. These tables do not include aseptics or the club soda/seltzer (waters) categories.

CAFFEINE FREE

An approximation of the total caffeine free market for packaged soft drinks can be made by adding the decaffeinated cola and decaffeinated pepper-type percentages to that of the lemon lime total. The result is 19.5%. This is a change of +10.4% since 1983.

D.4 FLAVOR

	Packaged	Bulk	Total
Cola	70.0	70.6	70.2
Lemon Lime	12.8	10.4	12.3
Waters	0.7	0.4	0.7
Aseptic	0.1	—	0.1
Other	16.4	18.6	16.7
	100.0%	100.0%	100.0%

D.5 BEVERAGE TYPE

	Packaged	Bulk	Total
Regular	78.0	87.0	79.5
Diet	21.2	12.7	19.8
Waters	0.8	0.3	0.7
	100.0%	100.0%	100.0%

D.6 REGULAR

	Packaged	Bulk	Total
Cola	68.2	68.2	68.3
Lemon Lime	12.8	11.6	12.5
Other	19.0	20.2	19.2
	100.0%	100.0%	100.0%

D.7 DIET

	Packaged	Bulk	Total
Cola	79.0	91.1	80.2
Lemon Lime	13.2	2.5	12.1
Other	7.8	6.4	7.7
	100.0%	100.0%	100.0%

D.8 CHANGE IN FLAVOR MIX (%):

	Packaged	Bulk	Total
Regular	4.1	9.3	5.6
Cola	11.5	20.7	13.6
Lemon Lime	11.0	64.0	15.8
Other	−18.6	−25.5	−19.2
Diet	19.6	45.2	20.1
Cola	29.9	46.2	31.2
Lemon Lime	33.8	−52.1	26.7
Other	−39.8	7.5	−37.8

D.9 COLA

	Packaged	Bulk	Total
Regular	76.0	84.0	77.3
Diet	24.0	16.0	22.7
	100.0%	100.0%	100.0%

D.10 LEMON LIME

	Packaged	Bulk	Total
Regular	77.9	96.6	83.3
Diet	22.1	3.4	16.7
	100.0%	100.0%	100.0%

D.11 REGULAR COLA

	Packaged	Bulk	Total
Regular	92.5	98.9	90.0
Decaffeinated	7.5	1.1	10.0
	100.0%	100.0%	100.0%

D.12 DIET COLA

	Packaged	Bulk	Total
Regular	76.1	97.6	79.2
Decaffeinated	23.9	2.4	20.8
	100.0%	100.0%	100.0%

D.13 FLAVOR SUMMARY OF THE PACKAGED SOFT DRINK MARKET IN PERCENT

Regular	
Cola	49.3
Lemon Lime	10.0
Orange	2.7
Ginger Ale	1.2
Grape	0.8
Root Beer	1.7
Pepper-type	2.4
Non-Carbonated	0.7
Other	5.2
Decaffeinated Cola	3.9
Decaffeinated Pepper-type	0.1
Sub-Total	78.0
Diet	
Cola	12.7
Lemon Lime	2.8
Orange	0.4
Ginger Ale	0.2
Grape	0.0
Root Beer	0.3
Pepper-type	0.4
Non-Carbonated	0.0
Other	0.3
Decaffeinated Cola	4.0
Decaffeinated Pepper-type	0.1
Sub-Total	21.2
ClubSoda/Seltzer	0.7
Aseptics	0.1
	100.0%

E. Vending

E.1 VENDING INFORMATION

Cola	68.4
Regular	52.5
Diet	15.9
Lemon Lime	13.7
Regular	10.5
Diet	3.2
Other	17.9
Regular	15.0
Diet	2.9
	100.0%

VENDING INFORMATION

The 1984 survey queried bottlers as to the flavor mix sold through their vending machines. These data are presented in Table E.1.

F. Sweeteners

F.1 HOW SOFT DRINKS ARE SWEETENED (%)

Beet/Cane Sugar	3.0%
HFCS	43.0%
Sugar + HFCS	32.7%
Aspartame	2.8%
Saccharin	5.0%
Aspartame + Saccharin	13.0%
Other Natural Sweeteners	0.1%
Natural (no sweetener added)	0.1%
Unsweetened	0.3%
	100.0%

F.2 SWEETENER USE (Quantities)

	Quantities (thousand lbs.)	Sweetener Equivalent (thousand lbs.)
Beet/Cane Sugar	1,117,000	1,117,000
HFCS	6,177,000	6,177,000
Aspartame	3,360	672,000
Saccharin	3,170	951,000

SWEETENER USE

No comprehensive data from other sources exist on the sweeteners used by the soft drink industry. To rectify this situation, the 1984 survey asked bottlers to provide data on how the drinks they sold were sweetened. Percentage figures were obtained and are presented in Table F.1. Factors were applied to these percentages to yield the figures given in column 1 of Table F.2. The factors used in the diet mix were 6 parts saccharin to 3 parts aspartame with a total sweetener of 9 mg. per fluid ounce. If only saccharin is used the calculation is based on 11 mg. per fluid ounce while all aspartame is based on 15 mg. per fluid ounce. Column 2 of Table F.2 converts the quantity figures into sweetener equivalents based on Beet/Cane Sugar and HFCS both having a sweetener level of one, Aspartame having a sweetener level of 200 and Saccharin having a sweetener level of 300.

G. Aseptics

G. ASEPTIC SIZES

0-200 ml.	non-reported
201-250 ml.	81.5%
251-375 ml.	18.5%
376-larger	non-reported

ASEPTICS

In 1983 for the first time data were requested on the amount of aseptics sold by bottlers. This year bottlers were also asked for aseptic package sizes.

H. Distribution

H.1 DISTRIBUTION CHANNELS

Home Market	Packaged	Bulk
Supermarkets	39.9	1.1
Grocery Stores	14.4	0.2
Drug Stores	4.7	(1)
Convenience Stores	9.4	(1)
Other Home Market	9.4	0.6
Total Home Market	77.8%	1.9%
On-Premise		
Vending	12.1	2.8
Restaurant/Bar/Fast Food	4.5	69.3
Drug Stores	(1)	0.7
Convenience Stores	(1)	6.1
Other On-Premise	5.6	19.2
Total On-Premise	22.2%	98.1%

(1) Explained in the last paragraph of this section.

H.2 DISTRIBUTION WITHIN CHANNELS

	Packaged	Bulk	Total
Supermarkets	99.5	0.5	100.0%
Grocery Stores	99.8	0.2	100.0%
Drug Stores	97.3	2.7	100.0%
Convenience Stores	89.5	10.5	100.0%
Other Home Market	98.9	1.1	100.0%
Vending	96.0	4.0	100.0%
Restaurants/Bar/Fast Food	26.2	73.8	100.0%
Other On-Premise	61.6	38.4	100.0%

DISTRIBUTION*

The expanded coverage of distribution channels first offered in last year's survey is continued again this year. Moreover, this year a specific channel distinction is made for both packaged and bulk in the drug and convenience store channels. As a result the home market classifications now more accurately parallel those of the food stores category reported by the A. C. Nielsen Company. The Nielsen food store category is essentially the sum of NSDA's supermarket, grocery, and convenience packaged classifications. The NSDA figures show this to represent 81.9% of the home market and 63.7% of total packaged goods sales. If one chooses to include bulk by point of sale, these three categories sum to 82.0% of the home market and 55.2% of the total market for soft drinks.

There is a problem in interpreting vending sales. We believe that vending, as reported by the bottlers, understates the amount of soft drinks actually sold through vending machines. Most bottlers report as vended only those soft drinks sold through the machines serviced by them. They are not in a position to report on whether a third party operator vends or otherwise sells the product sold to him by the bottlers. Bottlers also do not have a reliable way to estimate vending sales when a trade account fills a vending machine, as is the case with many food stores with machines on premise. It is not clear that there is an easy answer to this dilemma given the large number of vending machines used throughout the country. In interpreting the data, the reader should be aware of this situation.

The footnote (1) refers to the problem of allocating drug and convenience store volume between on-premise and home market. The decision was to allocate all bulk to on-premise, the most likely situation. Conversely, all of the packaged was assigned to the home market. Undoubtedly, some packaged is consumed on-premise, but bottlers cannot make this distinction and thus no data is available upon which to base an allocation.

*Derived from survey of bottlers. Does not include syrup distribution by food brokers or others.

I. Delivery and Method of Sale

I.1 DELIVERY AND METHOD OF SALE

Delivery and Method of Sale

	% of type	% of total
Delivery: Conventional Truck or Route Trailer		
Sales Method:		
Route Salesperson	55.7	47.6
Advance Salesperson	33.3	28.5
Tel-Sell	11.0	9.4
Total	100.0%	85.5%
Delivery: Multi-Case Modules by Transport Vehicle (bulk delivery body)		
Sales Method:		
Route Salesperson	15.4	2.2
Advance Salesperson	68.2	9.9
Tel-Sell	4.8	0.7
Other	11.6	1.7
Other	100.0%	14.5%

I.2 CASH VERSUS CREDIT SALES (Volume Basis)

Cash	30.0%
Credit	70.0%

DELIVERY AND METHOD OF SALE

This year for the first time data were requested on the method of sale and the method of delivery of packaged soft drinks. According to the responses, 49.8% of packaged goods were sold by route salespersons, 38.4% by advance salespersons and the remainder (11.8%) by tel-sell or other method.

From the delivery standpoint, 85.5% were delivered by conventional route truck or route trailers, while 14.5% were delivered in multi-case modules by transport vehicles. In general, the multi-case module refers to palletized deliveries. Within the two categories of delivery type, 55% of the sales delivered by conventional route trucks were made by route salepersons, 33.3% by an advance salesperson, and 11.0% by tel-sell. For the goods delivered in bulk delivery bodies, 15.4% were sold by route salespersons, 68.2% by an advance salesperson, 4.8% by tel-sell, and 11.6% by other arrangement with the trade. These data appear in Table I.1.

Table I.2 presents data on cash versus credit sales, another new item in 1984.

J. Vehicle Use

J.1 VEHICLES USED

	% of total
Delivery Trucks	57.3
Transports	6.9
Vans, etc.	
Supervisors	12.2
Advance Salesperson	9.5
Service Department	14.1
	100.0%

VEHICLE USE

Vehicle ownership received a great deal of attention on the federal tax front in 1984. For this reason it was decided to query bottlers asking selective questions on vehicle ownership and use. The data appearing in Table J.1 are derived from the responses to this portion of the NSDA Sales Survey. There is one delivery truck (conventional or route trailer) for each 57.4 thousand standard 288 oz. cases delivered by bottlers who do not deliver in multi-case modules. For those bottlers who utilize multi-case module delivery involving transport vehicles for 25% or more of their delivery to the trade, the ratio of delivery trucks to transports is 3.8 to 1. It is assumed that these transports are also used for other transfers as well as deliveries to the trade. Taking both types of vehicles together, the average number of standard 288 oz. cases delivered per vehicle is 85.4 thousand cases. For all companies, whether or not they make deliveries to the trade in transport vehicles, the average number of delivery trucks per transport is 7.6. The average number of delivery trucks per supervisor's vehicle is 4.7. On average there is one advance sales vehicle per 126,000 standard 288 oz. cases sold in this manner. Again, on average there is one service department vehicle for 4.1 delivery trucks and one service vehicle for every 250,000 standard 288 oz. cases sold. Other ratios of interest are the relationships between vehicles and total employees. According to the data there is one delivery truck for each 3 employees. There is one transport for each 25 employees and there is one supervisor vehicle for each 14 employees.

K. Productivity

K.1 PRODUCTIVITY AS A FUNCTION OF THE SALES TO PRODUCTION RATIO

Sales/Production Ratios greater than 1.2	
Sales Dollars/Employee	$145,430
Sales Gallons/Employee	70,400
Standard 288 oz. Case/Employee	31,290
Physical Cases/Employee (Packaged Only)	11,340
Sales/Production Ratios in the range 1.2 or less and equal to or greater than 0.8	
Sales Dollars/Employee	$161,840
Sales Gallons/Employee	71,600
Standard 288 oz. Case/Employee	31,830
Physical Cases/Employee (Packaged Only)	11,100
Sales/Production Ratios less than 0.8	
Sales Dollars/Employee	$141,620
Sales Gallons/Employee	58,200
Standard 288 oz. Case/Employee	25,860
Physical Cases/Employee (Packaged Only)	9,030

PRODUCTIVITY

In 1984 Sales Survey responses were solicited on a state specific basis for both sales and production. These data were used to provide additional specificity to the industry average sales dollar per employee and sales volume per employee data given earlier. As in 1983, these data are divided into three classifications: Whether the particular organization sold more than it produced in the state on which a particular response is based, whether they sold approximately the same amount as they produced or whether they produced more than they sold in the relevant state. Table K.1 gives this data. Four relationships are shown: Sales dollars per employee, sales gallons per employee, standard 288 ounce cases per employee and physical cases per employee. In calculating these relationships, the data are weighted, i.e., forms with larger amounts of sales are given proportionally greater weight in the calculation than those with lesser sales.

L. Typical Response

L.1 GROWTH PERCENTAGES

Volume Growth	6.9%
Sales Dollar Growth	7.9%
Employment Growth	2.6%

L.2 PACKAGE MIX

Refillable Glass	20.0%
One-Way Glass	13.4%
Plastic	26.3%
Cans	40.3%

L.3 FLAVORS (Packaged and Bulk Combined)

Cola	63.5%
Lemon Lime	15.4%
Other	21.1%

L.4 PRODUCTIVITY

Sales Volume/Employee	68,000 gallons (30,222 standard 288 oz. cases)
Sales Dollars/Employee	$161,700
Growth Sales Volume/Employee	5.3%
Growth Sales Dollars/Employee	9.0%

L.5 SALES

Sales Volume	14,518,700 gallons (6,452,755 standard 288 oz. cases)
Sales Dollars	$34,816,400

TYPICAL RESPONSE AND INDUSTRY AVERAGES DIFFER

All data presented in the earlier sections of this report represent industry averages. In deriving those averages each response was given a weight in proportion to its sales volume. In this section each response is given an equal weight, i.e., a weight of one regardless of the amount of sales volume reported.

REGIONAL DATA

Northeastern Region

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

East Central Region

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin

West Central Region

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southern Region

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

Western Region

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

Pacific Region

Alaska
California
Hawaii
Oregon
Washington

Southwestern Region

Arizona
New Mexico
Oklahoma
Texas

Regional Summary Data*

CHANGE FROM PREVIOUS YEAR (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
Total Volume	8.78	7.97	5.42	0.25	12.53	9.56	11.72
Packaged Volume	8.66	6.84	4.25	-2.88	12.38	7.68	11.61
Bulk Volume	9.49	16.09	13.04	15.63	13.20	15.47	12.17
Total Dollar Value	12.08	10.23	7.78	5.37	15.78	10.56	13.46
Packaged Dollar Value	12.11	10.63	7.54	4.67	15.30	9.39	13.55
Bulk Dollar Value	11.57	4.24	11.94	13.39	19.65	22.58	12.54
Employment	3.33	0.55	2.10	1.83	2.45	6.96	11.91

*Regional data are more affected by sample size variation and differences in respondents between the two years necessary for the calculation of growth rates than is the case with the national data. Regional data are for the bottler portion of market only.

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
1. Market Share By Market Type							
Packaged	89.0	87.8	85.3	78.7	80.2	74.9	79.2
Bulk	11.0	12.2	14.7	21.3	19.8	25.1	20.8
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2. Bulk							
Pre-Mix	16.4	16.7	9.3	15.8	4.8	9.2	5.4
Post-Mix	83.6	83.3	90.7	84.2	95.2	90.8	94.6
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
3. Packaged							
Refillable Glass	6.6	20.3	45.8	21.9	8.5	5.7	12.2
One-Way Glass	16.6	16.0	6.0	10.2	16.0	16.7	11.6
Plastics	43.2	25.5	16.7	26.6	22.5	14.8	13.0
Cans	33.6	38.2	31.1	41.3	53.0	62.8	63.2
Aseptics	0.0	0.0	0.4	0.0	0.0	0.0	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
4. Refillable Glass							
6-12 oz.	14.0	21.9	2.4	13.4	20.3	4.4	3.6
16 oz./0.5 liter	73.4	55.3	95.4	77.6	6.7	92.0	88.3
24-32 oz.	12.6	22.8	2.2	9.0	73.0	3.6	8.1
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
5. One-Way Glass							
6-12 oz.	13.0	22.8	13.0	13.5	13.5	13.0	12.2
16 oz./0.5 liter	80.3	74.8	83.3	77.6	81.8	76.0	79.3
24-32 oz.	6.7	2.4	3.7	8.9	4.7	11.0	8.5
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
6. Plastic							
0.5 liter	5.1	1.7	0.5	2.9	2.3	2.4	1.9
1 liter	9.0	2.1	2.0	1.1	0.3	0.8	2.6
2 liter	83.3	94.8	97.3	96.0	96.8	96.8	95.5
3 liter and larger	2.6	1.4	0.2	0.0	0.6	0.0	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
7. Cans							
Aluminum	81.6	78.7	98.6	84.1	100.0	100.0	100.0
Bi-Metal	18.4	21.3	1.4	15.9	0.0	0.0	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
8. Package Growth							
Refillable Glass	−8.2	−4.4	6.9	−26.5	−22.6	−48.6	−18.5
One-Way Glass	−0.7	−2.8	−1.8	6.8	0.3	119.1	57.7
Plastics	16.5	−0.9	−4.2	24.9	12.1	−8.7	−18.2
Cans	8.3	26.5	6.6	−2.4	26.6	8.3	23.0
9. Packaged & Bulk Flavor Type							
Regular	71.3	79.5	75.0	75.6	80.8	74.0	74.9
Regular Decaffeinated	3.7	2.5	4.8	4.5	2.6	3.7	3.5
Total Regular	75.0	82.0	79.8	80.1	83.4	77.7	78.4
Diet	19.6	14.7	15.9	15.8	13.8	17.4	17.0
Diet Decaffeinated	4.4	2.9	3.8	3.4	2.5	3.3	3.5
Total Diet	24.0	17.6	19.7	19.2	16.3	17.7	20.5
Waters	1.0	0.4	0.2	0.7	0.3	1.6	1.1
Aseptics	0.0	0.0	0.3	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
10. Packaged Flavor Type							
Regular	70.2	78.1	73.1	73.2	78.1	69.5	72.1
Regular Decaffeinated	4.1	2.8	5.4	4.4	3.1	4.4	4.1
Total Regular	74.3	80.9	78.5	77.6	81.2	73.9	76.2
Diet	19.7	15.3	16.5	17.4	15.4	19.8	18.2
Diet Decaffeinated	4.9	3.3	4.4	4.2	3.1	4.4	4.3
Total Diet	24.6	18.6	20.9	21.6	18.5	24.2	22.5
Waters	1.1	0.5	0.2	0.8	0.3	1.9	1.3
Aseptics	0.0	0.0	0.4	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
11. Bulk Flavor Type							
Regular	79.4	89.8	85.4	84.2	92.3	87.8	86.3
Regular Decaffeinated	0.6	0.2	1.0	4.3	0.1	1.2	1.3
Total Regular	80.0	90.0	86.4	88.5	92.4	89.0	87.6
Diet	18.9	9.7	12.9	10.3	7.4	10.1	11.8
Diet Decaffeinated	0.4	0.1	0.5	0.6	0.1	0.1	0.2
Total Diet	19.3	9.8	13.4	10.9	7.5	10.2	12.0
Club Soda/Seltzer	0.7	0.2	0.2	0.6	0.1	0.8	0.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern Region			Southern Region			East Central Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
12. Flavor									
Cola	71.5	69.5	71.3	73.7	72.9	73.6	73.5	73.6	73.5
Lemon Lime	8.9	9.9	9.0	10.5	10.4	10.5	9.5	8.3	9.4
Waters	1.1	0.7	1.1	0.5	0.2	0.5	0.2	0.2	0.2
Aseptics	0.0	–	0.0	0.0	–	0.0	0.4	–	0.3
Other	18.5	19.9	18.6	15.3	16.5	15.4	16.4	17.9	16.6
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
13. Beverage Type									
Regular	74.4	80.0	75.0	80.8	90.0	81.9	78.8	86.5	79.9
Diet	24.5	19.3	23.9	18.7	9.8	17.6	20.9	13.4	19.8
Waters	1.1	0.7	1.1	0.5	0.2	0.5	0.3	0.1	0.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
14. Regular									
Cola	68.8	68.8	68.8	72.2	70.6	72.0	72.1	70.2	71.8
Lemon Lime	9.1	11.5	9.4	10.6	11.3	10.7	9.1	9.3	9.1
Other	22.1	19.7	21.8	17.2	18.1	17.3	18.8	20.5	19.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
15. Diet									
Cola	82.7	74.8	82.1	82.2	96.0	83.1	80.5	96.3	82.2
Lemon Lime	8.9	3.4	8.4	10.3	1.8	9.7	11.5	2.3	10.5
Other	8.4	21.7	9.5	7.5	2.2	7.2	8.0	1.4	7.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
16. Cola									
Regular	71.6	79.3	72.4	79.2	87.2	80.1	77.1	82.5	77.9
Diet	28.4	20.7	27.6	20.8	12.8	19.9	22.9	17.5	22.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
17. Lemon Lime									
Regular	75.5	93.0	77.6	81.7	98.3	96.0	74.9	96.3	77.7
Diet	24.5	6.7	22.4	18.3	1.7	4.0	25.1	3.7	22.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
18. Regular Cola									
Regular	92.1	99.0	92.9	95.4	99.8	80.6	90.4	99.2	91.8
Decaffeinated	7.9	1.0	7.1	4.6	0.2	19.4	9.6	0.8	8.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
19. Diet Cola									
Regular	76.0	97.1	77.6	79.1	98.9	83.6	73.9	97.1	76.6
Decaffeinated	24.0	2.9	22.4	20.9	1.1	16.4	26.1	2.9	23.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

West Central Region			Southwestern Region			Western Region			Pacific Region		
Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
58.4	68.1	60.5	73.4	67.2	72.2	60.6	69.2	62.7	61.8	68.0	63.2
22.3	11.3	20.0	11.5	8.3	10.9	22.5	16.2	21.0	21.4	14.7	20.0
0.8	0.6	0.7	0.4	0.1	0.3	1.9	0.8	1.6	1.3	0.4	1.1
0.0	–	0.0	0.0	–	0.0	0.0	–	0.0	0.0	–	0.0
18.5	20.0	18.8	14.7	24.4	16.6	15.0	13.8	14.7	15.5	16.9	15.7
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
77.6	88.4	79.9	81.2	92.4	83.4	73.9	89.1	77.7	76.1	87.6	78.5
21.6	11.0	19.3	18.4	7.5	16.3	24.2	10.1	20.7	22.6	12.0	20.4
0.8	0.6	0.8	0.4	0.1	0.3	1.9	0.8	1.6	1.3	0.4	1.1
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
56.6	65.2	58.6	72.1	65.2	70.6	59.2	66.7	61.4	59.7	64.5	60.8
22.0	12.5	19.8	11.5	8.9	10.9	23.0	17.7	21.5	22.1	16.3	20.8
21.4	22.3	21.6	16.4	25.9	18.5	17.8	15.6	17.1	18.2	19.2	18.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
67.3	94.8	70.6	80.7	91.1	81.7	69.5	96.2	72.8	72.5	96.4	75.4
24.2	2.6	21.6	11.9	1.7	10.9	22.9	3.8	20.5	20.2	3.4	18.2
8.5	2.6	7.8	7.4	7.2	7.4	7.6	0.0	6.7	7.3	0.2	6.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
75.2	84.7	77.5	79.8	89.8	81.6	72.2	85.9	76.0	73.5	83.0	75.6
24.8	15.3	22.5	20.2	10.2	18.4	27.8	14.1	24.0	26.5	17.0	24.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
76.6	97.5	79.1	81.1	98.4	83.7	75.4	97.6	79.7	78.6	97.2	81.4
23.4	2.5	20.9	18.9	1.6	16.3	24.6	2.4	20.3	21.4	2.8	18.6
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
90.1	96.3	91.7	94.8	99.8	95.8	89.9	97.9	92.4	91.3	97.7	92.9
9.9	3.7	8.3	5.2	0.2	4.2	10.1	2.1	7.6	8.7	2.3	7.1
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
71.7	94.5	75.4	80.8	97.9	82.5	73.8	99.4	78.0	74.0	98.1	77.7
28.3	5.5	24.6	19.2	2.1	17.5	26.2	0.6	22.0	26.0	1.9	22.3
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
20. FLAVOR SUMMARY							
Regular							
Cola	47.1	55.7	51.3	39.5	55.7	39.4	41.6
Lemon Lime	6.8	8.6	7.1	17.1	9.3	17.1	16.8
Orange	4.3	2.4	2.1	1.8	3.0	1.8	3.2
Ginger Ale	3.1	0.6	0.8	1.3	0.4	1.3	0.5
Grape	0.9	0.9	0.2	0.8	0.8	0.8	0.4
Root Beer	1.9	0.8	1.4	2.4	1.6	3.2	2.5
Pepper-type	1.1	4.0	1.5	3.7	3.9	1.0	1.3
Non-Carbonated	0.9	0.3	0.6	0.7	0.2	0.8	1.4
Other	4.1	4.8	8.1	5.9	3.2	4.1	4.4
Decaffeinated Cola	4.1	2.7	5.4	4.4	3.0	4.4	3.9
Decaffeinated Pepper-type	0.0	0.1	0.0	0.0	0.1	0.0	0.2
Sub-Total	74.3	80.9	78.5	77.6	81.2	73.9	76.2
Diet							
Cola	15.4	12.1	12.5	10.4	12.1	12.5	12.1
Lemon Lime	2.2	1.9	2.4	5.2	2.2	5.5	4.6
Orange	0.5	0.1	0.2	0.1	0.3	0.2	0.4
Ginger Ale	0.4	0.1	0.2	0.2	0.0	0.1	0.0
Grape	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Root Beer	0.4	0.1	0.4	0.4	0.1	0.5	0.6
Pepper-type	0.3	0.7	0.3	0.7	0.6	0.2	0.2
Non-Carbonated	0.1	0.0	0.0	0.1	0.0	0.0	0.0
Other	0.4	0.3	0.5	0.3	0.1	0.8	0.2
Decaffeinated Cola	4.9	3.2	4.4	4.1	2.9	4.4	4.3
Decaffeinated Pepper-type	0.0	0.1	0.0	0.1	0.2	0.0	0.1
Sub-Total	24.6	18.6	20.9	21.6	18.5	24.2	22.5
Club Soda/Seltzer	1.1	0.5	0.2	0.8	0.3	1.9	1.3
Aseptics	0.0	0.0	0.4	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern Region		Southern Region		East Central Region	
	Packaged	Bulk	Packaged	Bulk	Packaged	Bulk
21. Distribution						
Supermarket	39.4	0.4	38.0	0.2	39.5	0.8
Grocery	24.0	0.3	10.3	0.1	14.5	0.4
Drug	4.1	0.3	3.8	0.7	4.4	1.2
Convenience	6.4	2.1	12.7	4.2	9.1	1.4
Other Home Market	10.3	0.3	4.5	0.7	12.0	0.3
Vending	8.4	9.0	15.8	4.0	10.5	5.7
Restaurant/Bar/Fast Food	3.3	61.2	6.8	68.2	3.4	63.7
Other On-Premise	4.1	26.4	8.1	21.9	6.6	26.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

	West Central Region		Southwestern Region	
	Packaged	Bulk	Packaged	Bulk
21. Distribution (cont.)				
Supermarket	45.5	0.5	38.2	3.0
Grocery	7.3	0.1	9.8	0.4
Drug	3.8	0.5	4.0	0.6
Convenience	8.4	13.6	8.0	9.7
Other Home Market	6.6	0.4	12.7	2.5
Vending	16.5	0.3	21.4	1.3
Restaurant/Bar/Fast Food	1.7	71.8	2.4	65.6
Other On-Premise	10.2	12.8	3.5	16.9
Total	100.0	100.0	100.0	100.0

	Western Region		Pacific Region	
	Packaged	Bulk	Packaged	Bulk
21. Distribution (cont.)				
Supermarket	48.0	0.7	48.6	0.1
Grocery	10.2	0.2	13.1	0.1
Drug	5.4	0.3	3.9	0.1
Convenience	10.2	8.1	7.3	3.6
Other Home Market	7.4	0.1	9.0	0.1
Vending	17.1	1.1	9.4	0.3
Restaurant/Bar/Fast Food	1.4	78.2	4.2	73.2
Other On-Premise	0.3	11.3	4.5	22.5
Total	100.0	100.0	100.0	100.0

Estimated Annual Production and Consumption of Soft Drinks

Year	Total Value $ (Wholesale)	Total Cases (288 ounce)	Per capita (12 oz. containers)
1984	22,231,238,000	4,615,380,000	469.0
1983	20,131,180,000 (see note)	4,274,274,000	438.4
1982	21,156,140,000	4,065,815,000	419.5
1981	20,015,269,000	3,959,697,000	412.3
1980	17,676,648,000	3,816,575,000	401.0
1979	14,972,628,000	3,664,500,000	389.0
1978	13,344,588,000	3,490,000,000	375.0
1977	11,526,810,000	3,247,722,000	353.0
1976	10,375,167,000	2,952,474,700	324.0
1975	9,397,797,600	2,610,499,300	289.0
1974	7,827,131,000	2,532,007,300	283.0
1973	6,223,156,500	2,514,406,700	284.0
1972	5,683,820,000	2,360,944,700	269.0
1971	5,346,960,000	2,235,743,300	258.0
1970	4,799,784,000	2,064,423,300	241.0
1969	4,369,664,000	1,942,073,300	229.6
1968	4,165,552,000	1,851,356,700	221.1
1967	3,458,632,000	1,646,968,000	198.7
1966	3,175,980,000	1,568,391,300	191.3
1965	2,735,567,000	1,402,854,700	172.7
1964	2,533,167,000	1,299,060,000	161.9
1963	2,341,189,000	1,200,601,000	151.6
1962	2,001,016,800	1,111,676,000	142.3
1961	1,829,083,200	1,016,157,300	132.2
1960	1,698,025,600	984,362,700	128.0
1959	1,633,015,900	989,706,700	133.2
1958	1,427,463,500	906,326,000	124.3
1957	1,347,241,500	907,233,300	126.1
1956	1,308,000,000	880,809,300	125.9
1955	1,252,276,000	843,283,300	122.8
1954	1,166,605,000	784,449,300	116.1
1953	1,089,513,000	785,234,700	118.3
1952	1,019,295,000	755,033,300	116.0
1951	939,442,500	695,833,300	108.5
1950	876,532,600	667,834,300	105.3
1949	860,959,300	675,262,200	108.0
1948	835,157,300	673,242,500	109.6
1947	745,676,000	601,109,300	100.6
1946	617,168,600	514,307,200	88.2
1945	584,994,000	487,495,000	88.6
1939	361,690,917	321,997,120	59.1
1929	214,322,238	181,618,990	35.4
1919	135,341,000	112,784,100	25.6
1909	43,508,000	41,436,200	10.8
1899	23,269,000	28,854,450	8.1
1889	14,354,000	17,398,800	6.6
1879	4,742,000	6,322,700	3.0
1869	4,222,000	5,629,300	4.3
1859	1,415,000	1,886,700	1.5
1849	760,000	1,013,300	1.1

NOTE: 1984 mid-year Resident Population was 236,158,000 according to U.S. Bureau of the Census. For purposes of this report, soft drink sales for the industry as a whole are expressed in cases of 24 twelve-ounce containers. Beginning in 1983 sales value was explicitly requested as "net of volume discounts and price off." The result was a definitional revision to the 1983 data. The dollar figure shown in the 1983 survey was $20,562,545,000. As this represented 7.1% growth from 1982, 1982 would have been $19,201,919,270. This year another revision was made to the 1983 data resulting from a restatement of the 1983 dollar figure. The new 1983 total sales figure is $20,131,180,000 as shown in the table above.

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